



## Summary of ULI Singapore Member Roundtable Discussions on Singapore's Long Term Plan Review





## **Executive Summary**

On 14 October 2021, 59 ULI Singapore members participated in a roundtable discussion about Singapore's long-term land use plans, as well as to share ideas and suggestions with the Urban Redevelopment Authority (URA) as part of their Phase 2 public engagement exercise for its Long Term Plan Review (LTPR) 2021-2022.

URA was looking into four key areas as part of the LTPR: the Future of Work; the Future of the Environment; the Future of Living and the Future of Mobility. Since mobility is intertwined with the environment and the way we work and live, the roundtables were organised around the other three key areas, with the participants of each roundtable guided to consider the Future of Mobility during the discussion.

One participant was responsible as group lead in each group, supported by a URA facilitator and a volunteer scribe. Each group was given 90 minutes to discuss the assigned theme and was then allowed to add further input within a week of the in-person discussion. Participants came from different age groups and areas of expertise.

The following are the key points that arose from each group discussion:



## Future of work (in the CBD)

With an emphasis in recent times on the flexibility of work arrangements, there is a growing demand for greater diversity in live-work-play options. The renewed focus on quality of life means that talents want more control over how they spend their time, so what is needed is an environment that can efficiently allow that. We need more mixed-use developments, with environments that stimulate creativity/innovation but also serve as places of rest/refuge, to promote good work-life balance.

The central business district should be somewhere people go to, not just for work, but for play too, such as for sport, culture, dining and entertainment offerings. It was suggested to reduce private-car entry into the CBD even further than current measures, with proposed initiatives such as converting parking lots to fresh uses and reclaiming roads, where possible, for F&B/entertainment. Also, less prescriptive zoning should be implemented, so that landlords have more freedom to play around with creative mixes of use for their buildings. With more people living in the CBD, this would create opportunities to add social infrastructure such as schools and public housing, thereby enhancing the vibrancy of the CBD

For an environmentally-friendly CBD, there needs to be more stringent green building standards, better government infrastructure and vocal support for recycling, renewable energy, electric vehicle charging, as well as alternative cooling systems on a building level.

Having more green spaces would enhance health and wellbeing. The importance of building a like-minded community and cultivating habits with sustainable infrastructure and incentives was also noted.



## Future of environment

To allow for the decarbonisation of existing assets, there needs to be more emphasis on the circular economy approach, through the usage of sustainable construction materials and consideration of the long term trade-offs vs a cheaper onset of costs in planning and development.

The future of the environment is not just about talking about doing the right thing; millennials will be the dominant decision-makers soon and it is heartening that their generation is environmentally and socially conscious. Therefore, the built-environment industry needs to align with their aspirations. Once society as a whole becomes more environmentally conscious, the industry that embraces greener practices will be more attractive to future talents.

To overcome inertia to adopt green measures, policies, planning and regulations will be needed, to guide the community on the roadmap and to use resources more efficiently. It will take time for the community to embrace the “why” of the buy-in. Once this happens and the community takes ownership, policies, planning and regulations can then be relaxed.

Singapore is a country constrained in its scarce land and resources so it is important to make good use of what we already have, such as repurposing current spaces. Effective repurposing will mean that buildings can continue to be used in a way that is beneficial to the community. This would also allow for the culture of Singapore to be preserved as the built environment evolves.

There should be grants to allow for the adaptive reuse/repositioning of the space in lieu of a tear-down-and-rebuild approach. Policies and regulations should promote a fine balance to incentivise stakeholders to adopt adaptive reuse where possible, while managing market dynamics to make this option financially sustainable. A good case study of this is in the plans to preserve and refresh Golden Mile Complex.

The first step towards a brighter future for the environment is to make information accessible to all, so as to enable more considered choices, followed by greater opportunities to make more sustainable decisions.



## Future of living

A broader variety of accommodation options should be made available, at different price points, to cater for the future of living. This should meet the demands of Singapore's shifting demographic profile, such as an ageing population and households that no longer fit traditional paradigms (e.g. singles, single parents, widows, LGBT couples, etc.). A dynamic and flexible housing market can help Singapore remain competitive in the battle for global talents.

The need for flexible spaces in the coming decades, due to the increasing integration/blurring of space and activities in the digital, sharing economy, was noted. Technology, and the changes brought about by the pandemic and work-from-home policies, is changing how we utilise spaces and this will redefine real estate. Therefore, planning parameters will have to allow for quick changes and adaptations in a sustainable and green way.

In a highly globalised world, our sense of attachment to a place can get diluted. For Singapore, however, being a “lovable city” would strengthen a sense of emotional connection for its residents, which would be also important for continued nation-building and the establishment of identity.

## Conclusion

Changes in the ways we are living and working means that we need to change the way we use and enjoy spaces. Plus, with changing demographics, Singapore has to cater to a wide array of households and their needs. This would entail a modification of government regulations.

Also, when planning for the future, the environment has to be a big consideration. With concerns over climate change, there needs to be a move towards more sustainable planning and building.



## About ULI

The Urban Land Institute (ULI) is the oldest and largest network of cross-disciplinary real estate and land use experts in the world. Our members actively drive our institute's mission to ***shape the future of the built environment for transformative impact in communities worldwide.***

## Long Term Plan Review

ULI Singapore invited members to participate in a roundtable discussion about Singapore's long-term land use plans and to share our collective ideas and suggestions with Urban Redevelopment Authority (URA) as part of their Phase 2 public engagement exercise for its Long Term Plan Review (LTPR) 2021. This phase aims to set out a collective vision for Singapore.

The format of the roundtable was developed in consultation with URA and ULI Singapore, with the discussion led by one of ULI's members *Chintan Raveshia, Cities Leader, Southeast Asia, Arup.*

There were 4 key areas that URA was looking into as part of the LTPR: Future of Work; Future of the Environment; Future of Living and Future of Mobility. Given that mobility is intertwined with the environment and the way we work and live, the roundtables were organised around the Future of Work, the Future of the Environment and the Future of Living and each roundtable were guided to consider the Future of Mobility during the discussion. Under each theme, the discussants were required to answer 3 questions:

1. What vision or outcome(s) do you want to achieve?
2. Why did you focus on these points and why are they of utmost importance to your team?
3. How do you think we can get there? What changes would you like to see? What are the gaps or barriers in the way? What signposts will indicate we are on the right track?

## The Roundtable Discussions

Fifty-nine ULI members across different age groups and expertise were grouped into 12 different roundtables, with 4 groups looking into each theme in-person. Within each group, one of the participants was responsible as group lead, supported by a URA facilitator and a volunteer scribe. Each group was given 90 minutes to discuss the theme and were also allowed time to add further inputs any time within a week after the in-person discussion.

The inputs were further reviewed and crystallised into key points, and ULI Singapore followed up with the group leads for further comments around these key points, with considerations for the future of mobility:

Future of Work (in the CBD)	<ol style="list-style-type: none"> <li>1. Talent attraction             <ol style="list-style-type: none"> <li>(i) What do the future talent want in terms of live, work and play?</li> <li>(ii) Why is talent attraction strategy important for the future of work in Singapore?</li> <li>(iii) How do we attract current and future talent (within Singapore and from abroad)? Respond along the lines of place, policy, opportunities, etc</li> </ol> </li> <li>2. Vibrant CBD             <ol style="list-style-type: none"> <li>(i) What do we mean by a vibrant CBD?</li> <li>(ii) Why does a CBD need to be vibrant for its success?</li> <li>(iii) How is this achievable? (policies, planning, economics)</li> </ol> </li> <li>3. Environmentally conscious CBD             <ol style="list-style-type: none"> <li>(i) What change do we need to increase consciousness (place, policy, talent etc)?</li> <li>(ii) Why is this important for the future of work?</li> <li>(iii) How do we increase consciousness in the work culture?</li> </ol> </li> </ol>
Future of Environment	<ol style="list-style-type: none"> <li>1. Decarbonising of existing assets             <ol style="list-style-type: none"> <li>(i) What changes do we need to achieve this?</li> <li>(ii) Why is this important for the future of Singapore?</li> </ol> </li> </ol>

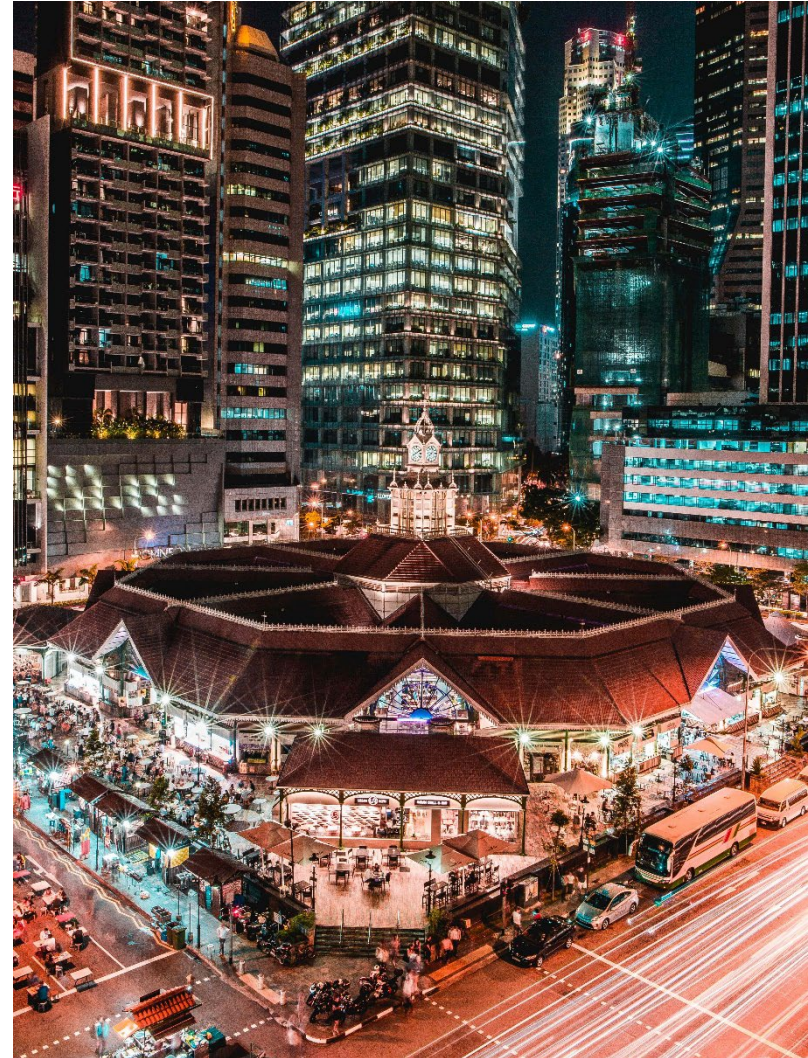
	<p>(iii) How do we do this? (policy, planning, regulations changes?)</p> <p>2. Adaptive reuse</p> <ul style="list-style-type: none"> <li>(i) What do we mean by adaptive reuse and where?</li> <li>(ii) Why is adaptive reuse crucial for Singapore's success?</li> <li>(iii) How can this be achieved? (policy, planning regulations, economics?)</li> </ul> <p>3. Sustainability requirements across supply chain for new builds</p> <ul style="list-style-type: none"> <li>(i) What can government do to achieve sustainability targets across supply chains?</li> <li>(ii) Why is government leadership needed for this initiative or can this be achieved through private players?</li> <li>(iii) How can we make this workable across the supply chain from large players to smaller ones (e.g., renewable energy)?</li> </ul>
Future of Living	<p>1. Widened variety of accommodation options</p> <ul style="list-style-type: none"> <li>(i) What do we mean by widened variety?</li> <li>(ii) Why is this approach necessary for our social resilience and changing demographic?</li> <li>(iii) How can we propagate this change? Is it gradual or a quick change?</li> </ul> <p>2. Flexible spaces and community hubs</p> <ul style="list-style-type: none"> <li>(i) What do we mean by flexibility? Is it only physical spaces or includes planning regulations?</li> <li>(ii) Why do we need this flexibility in the coming decades?</li> <li>(iii) How do we achieve this? Is this a government led initiative or bottom up?</li> </ul> <p>3. Celebrating memories for a 'lovable city'?</p> <ul style="list-style-type: none"> <li>(i) What do we consider as a lovable city?</li> <li>(ii) Why is this so important at this juncture? Is it related to social resilience and community empowerment?</li> <li>(iii) How can we enhance our environment to celebrate, propagate and sustain our 'memories' in the city?</li> </ul>



This report presents a summary of the multi-disciplinary perspectives from ULI members.



**FUTURE OF WORK IN CBD**



Talent Attraction	What do the future talent want in terms of live, work and play?	Why is talent attraction strategy important for the future of work in Singapore?	How do we attract current and future talent (within Singapore and from abroad)? Respond along the lines of place, policy, opportunities, etc
Group 1	More mixed use development, shorter commute times, multiple modes of mobility and flexible hours with options to work at anytime from anywhere rather than fixed work hours.	Limited population, limited graduates and hence multiple layers of workers/ talent have to be imported. Talent attraction strategy is a must for a small city state like Singapore to stay competitive in the region and globally.	<ul style="list-style-type: none"> <li>• Create a Sustainable city that is bustling and thriving with opportunities to engage, interact, ideate for human, social and financial progress.</li> <li>• Financial Hub, Tech Hub, Educational Hub, Medical Hub, Design Hub etc. - besides creating uses – assemble these to provide a high quality of life. (Singapore is already a leader in this space)</li> <li>• Loosen immigration policy further for highly skilled workers and at a minor premium over local talent.</li> <li>• Govt support for a variety of businesses beyond the usual finance and tech businesses, so as not to price itself out of the region for design, art, and humanities.</li> <li>• Govt programs to attract international talent for 6 months to 1 year internship opportunities with minimal immigration restriction.</li> </ul>

Group 2	Less separation of each of these activities into their own specific places. More work from home and play from the office.	I think attracting employees to Singapore isn't hard. The focus needs to be on attracting a creative and diverse set of employees to Singapore is the hard part. Plenty of wealth managers will come to Singapore just because the tax policy is beneficial, but to make Singapore a vibrant city, we need tech entrepreneurs, non-profits, and artists.	Acceptance and encouragement of all forms of diversity beyond just racial and religious diversity. Different ideas for how people define success, how they think, how they live, and even where they live should all be embraced and celebrated.
Group 3	<ul style="list-style-type: none"> <li>• Flexibility, convenience, and a diversity of live-work-play options that can accommodate to various everyday needs and schedules. With the renewed focus on quality of life, talents want to be able to take more control of how they spend their time. An environment that can efficiently allow that would seem most attractive.</li> <li>• Ability to experience continuous learning and development. These may be through job opportunities that allow them to work with diverse people and cultures, beyond borders. With globalisation, the knowing how we are all interconnected is a skill talent may want to build to have an edge over others.</li> <li>• Exciting environments that may stimulate creativity/innovation but also places of rest/refuge, for good work-life balance</li> </ul>	<ul style="list-style-type: none"> <li>• Keep competitive amid weaknesses like an ageing population; keeps us relevant in the global stage as a small city; maintains investment</li> <li>• Innovate and move forward with new trends/disruptions</li> <li>• Enhance our local talent pool. Foreign talents are found to make working environments more vibrant and contribute towards R&amp;D. Many Silicon Valley companies have grown by pulling in foreign talent educated at leading American universities.</li> </ul>	<ul style="list-style-type: none"> <li>• Having physical incubators/hubs for new ideas</li> <li>• Cultivating good working culture with work-life balance</li> <li>• Staying connected to the world</li> <li>• Ensuring personal and financial safety/health</li> <li>• Safeguarding affordability</li> <li>• Attracting international organisations</li> <li>• Shaping superior urban landscapes (e.g., infrastructure, environments, transport)</li> <li>• Stable economy and good governance</li> <li>• Being open to expatriates, inclusive society</li> <li>• Having good schools</li> <li>• Offering cultural experiences</li> </ul>

Vibrant CBD	What do we mean by a vibrant CBD?	Why does a CBD need to be vibrant for its success?	How is this achievable? (policies, planning, economics)
Group 1	<p>More mixed use development - not the mega scale mixed use developments, but the <u>human scale mixed use at street level</u> including 24/7 operations.</p> <p>Residential, Co-living, entertainment, F&amp;B should be increased by reducing private cars entering CBD and reclaiming roads and parking for such uses.</p>	<p>Changing consumption patterns of millennials, gen X and Gen Z will demand this, and this is the only way ahead for city life.</p>	<p>Reduce Private car entry into CBD even further. Convert parking lots to other uses within existing developments with minimal development charges for change of use if developers rent these spaces to start-up ventures at discounted prices within CBD.</p> <p>Reclaim roads where possible for F&amp;B, entertainment or pocket parks given to pop up ventures.</p>
Group 2	<ul style="list-style-type: none"> <li>• A city with a wide range of physical spaces and possible experiences.</li> <li>• 24/7 activity</li> <li>• A place that people <i>want</i> to go to not only for work, but after work for dinner and entertainment.</li> </ul>	<p>Both expensive spaces for multinational companies to set up offices and affordable spaces for young aspiring chefs to start small cafes.</p>	<p>Less prescriptive zoning so that landlords have more freedom to play around with creative mixes of uses for their buildings. The loft apartments in old industrial buildings that has led to the gentrification of so many neighbourhoods around the world would be completely impossible in Singapore.</p>
Group 3	<p>A CBD that...</p> <ul style="list-style-type: none"> <li>• Supports the economy through time</li> <li>• Sustains a live-in population</li> <li>• Has regular placemaking</li> <li>• Provides conducive civic spaces and greenery with opportunities for all and a variety of lifestyle options &amp; offerings to facilitate meaningful interactions/face-to-face interaction.</li> </ul>	<ul style="list-style-type: none"> <li>• Build a strong, resilient ecosystem of community, businesses, amenities, and infrastructure.</li> <li>• To continue driving the economy as the centre of economic activity amid competing districts and decentralization</li> </ul>	<ul style="list-style-type: none"> <li>• Refreshing building and land use policies to allow owners to adapt quickly, test new innovations. <ul style="list-style-type: none"> <li>○ Rethink traditional zoning concepts</li> <li>○ Update building codes to be performance-based rather than prescribed</li> </ul> </li> <li>• Introducing creative uses, buildings <ul style="list-style-type: none"> <li>○ Have makerspaces</li> </ul> </li> </ul>

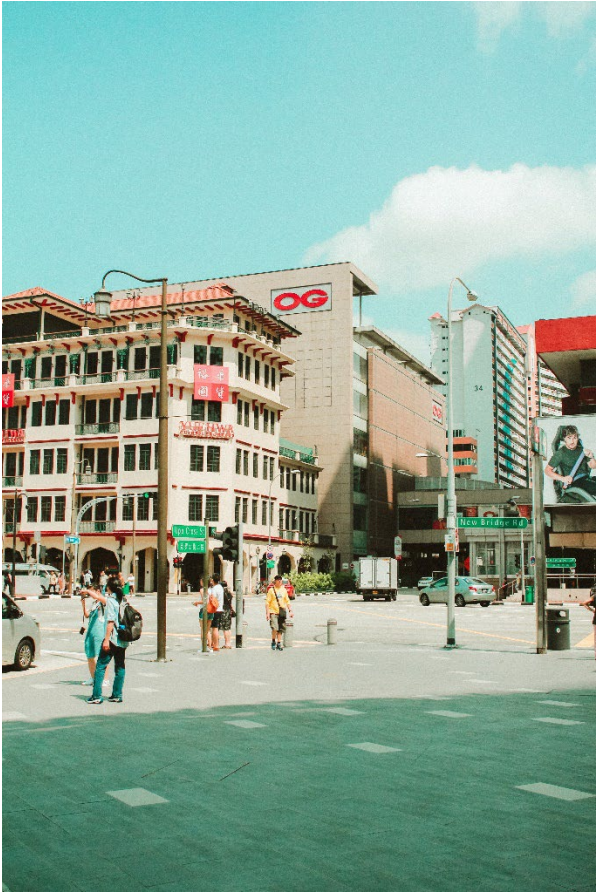
Environmentally Conscious CBD	What change do we need to increase consciousness (place, policy, talent etc)?	Why is this important for the future of work?	How do we increase consciousness in the work culture?
Group 1	<p>Ties back to car lite, use the previously dedicated car space for micro parks, open spaces, etc. Will have to be largely driven by policy and planning.</p> <p>In addition, SG govt is already allowing extra DC free GFA for greening options, so this should continue and maybe even expanded further.</p> <p>Developers should consider offering rent subsidies for tenants that adopt certain green initiatives that add to the long term value of the building. (will need development of a framework)</p>	<p>Humans like to see and be seen. Vibrant human scale environments that offer spaces/ places for chance encounters are the birthing place of ideas.</p> <p>Social dynamics and knowledge exchanges is what drives human progress and cities offer this canvas.</p>	<p>By providing spaces for</p> <ul style="list-style-type: none"> <li>rest and reflection (aka – green and open spaces, maybe even tech free spaces),</li> <li>spaces for interaction (aka - plazas, entertainment, F&amp;B etc)</li> </ul>
Group 2	<p>More stringent green building standards that the government requires for new projects.</p> <p>Better governmental infrastructure for and vocal support for recycling, renewable energy, electric vehicle charging.</p> <p>Encouragement for alternative cooling systems on a building-level rather than all split unit air conditioning.</p>		<p>Environmental consciousness only develops if it is reinforced continually throughout one's life and in different areas. The government, companies, and family all need to stress the importance of environmental consciousness. Right now, the only real push I regularly see in the real estate industry is from large multinational real estate fund managers.</p>

Group 3	<ul style="list-style-type: none"> <li>• Explaining the business case and how the environment affects finances, business strategies</li> <li>• Building understanding on how the environment links to values or things that individuals care about. Demonstrate the benefits of being environmentally conscious and ease of practicing good habits</li> </ul>	<ul style="list-style-type: none"> <li>• Plays a part in mobility/travel choices</li> <li>• Accelerates the green and digital transition to improve our ways of working</li> <li>• Enhances wellbeing and health with green/blue spaces that the people value</li> <li>• Allow for sustainable, agile workplaces to optimize resources and reduce the need for space, especially through a circular approach</li> </ul>	<ul style="list-style-type: none"> <li>• Building a like-minded community</li> <li>• Cultivating habits with sustainable infrastructure and incentives</li> </ul>
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**Future of Work Discussants (in alpha order of organisation)**

Name	Title	Organisation
Darren Sabom	Managing Director, Investment Management	8M Real Estate
Scott Dunn	Chief Strategy Officer, Asia	AECOM
Chew Kokyong	Co-Founder and Studio Lead	Afternaut
Michelle Goh	Head of Public Policy, Southeast Asia, Hong Kong, Taiwan & India	Airbnb
Aidan Ang	Senior Associate	Baring Private Equity Asia
Chew Peet Mun	Managing Director, Workspace & Residential, Singapore	CapitaLand
Sidharth Dhawan	Regional Head of Agile Real Estate, Asia Pacific	CBRE
Nicole Lum	Manager, Research	Centre for Liveable Cities
Terence Tang	Managing Director, Capital Markets	Colliers
Chia Khong Shoong	Group Chief Corporate Officer	Frasers Property Limited
Luca Dotti	Founder and Managing Director	HOMA
Anthony Couse	CEO, Asia Pacific	JLL
Christopher Fossick	CEO, Southeast Asia	JLL
JD Lai	CIO and interim CEO, Asia	M&G Real Estate
Chao Fu	Investment Associate	Partners Group
Lee Gek Lang	Chief Operations Officer, Asia Pacific	PGIM Real Estate
Fiona Nixon	Director	STUDIO NvS Architecture and Design
Jaelle Ang	CEO & Founder	The Great Room
Gaurang Khemka	Founding Director	URBNarc

**FUTURE OF ENVIRONMENT**





Decarbonising of Existing Assets	What changes do we need to achieve this?	Why is this important for the future of Singapore	How do we do this? (policy, planning, regulation changes?)
Group 4	<ul style="list-style-type: none"> <li>• Need for a localised standard for benchmarking/ guideline</li> <li>• Transparent case studies for successful decarbonising projects</li> </ul>		<ul style="list-style-type: none"> <li>• Improved guidelines like Green Mark</li> <li>• Financial assistance or process guidance especially for SME building owners</li> </ul>
Group 5	<p>The circular economy needs to be more emphasized, with usage of sustainable construction materials, and thinking of the long term trade-offs vs a cheaper onset of costs.</p> <p>A greater focus for building owners to carry out net zero carbon emissions strategy reviews for their buildings to understand where they stand and what can be done.</p>	<p>In order to reduce the impact of carbon on our environment, which in turn impacts our standard of living in the future, it is key to understand the ways we can make a difference.</p>	<p>Benchmark buildings to allow for building owners to understand where they stand.</p> <p>Incorporation of criteria for carbon reduction to be in the Green Mark Framework.</p>
Group 6	<ul style="list-style-type: none"> <li>• Building regeneration instead building of a new building.</li> <li>• Using of sustainable material.</li> </ul>	<p>Increasing the quality of life, carbon emission reduction, personal well-being improvement.</p>	<p>Implement rules and regulation in design practice, i.e., Green Mark, RE100, etc.</p>

Group 7	Mindset	Beyond doing the right thing, many Millennials are environmentally and socially conscious. They will be the dominant decision makers soon and we need to align with their aspirations. If society as a whole, starting with the CBD, becomes environmentally conscious, we will be more attractive to (future) talent.	Start with policies, planning and regulations to overcome the inertia, to guide the community on the road map, use resources efficiently and for the community to embrace the “why” as buy-in will take time. Once there is buy-in and the community takes ownership, policies, planning and regulations can be relaxed.
Adaptive reuse	What do we mean by adaptive reuse and where?	Why is adaptive reuse crucial for Singapore’s success?	How can this be achieved? (policy, planning regulations, economics)?
Group 4	Incentives for adaptive reuse of buildings (e.g., to limit total demolition)	Urban regeneration is important to ensure physical relevance in the built environment but too often demolition has been the option selected especially for residential	Incentives may include boost in GFA or waiver of DC charges Success cases  Changes/ flexibility in planning use groups
Group 5	Adaptive reuse indicates an effective repurposing of the current space use to something else that is suitable so that the building can continue to be used in a way that is beneficial to the community.	With a land tight/ resource tight country, it is important to make good use of what we already have. It also allows for the culture of Singapore to be preserved, when more intentionality is being set upon the use of a space for the community instead of just focusing on the financial aspect of possibly just rebuilding into an asset that makes money.	More case by case basis of planning permissions and policies for each building which are more specific than being cantered around certain areas (e.g., CBD Raffles Place/ Tanjong Pagar as a whole)  Longer term permits given with more onuses given to building owners to revitalize their common spaces. Giving each building owner an increased level of autonomy allows for more creativity.  Grants to allow for an adaptive reuse/ repositioning of the space rather than a tear down and rebuilt.

Group 6	Adaptive reuse is similar like building regeneration, fit-out, etc. To repurpose the function of the existing buildings.	Urban regeneration is important to ensure physical relevance in the built environment but too often demolition has been the option selected especially for residential	<ul style="list-style-type: none"> <li>Incentives may include boost in GFA or waiver of DC charges</li> <li>Success cases</li> <li>Changes/ flexibility in planning use groups</li> </ul>
Group 7	Giving a building a new lease of life by allowing it to adapt to changes by introducing uses beyond what it was first intended for, so it can remain relevant	<ul style="list-style-type: none"> <li>Environmentally friendly</li> <li>Conserve our heritage and history</li> <li>Enhance sense of place and pride</li> </ul>	Policies and regulations that promote a fine balance to incentivise stakeholders to adopt adaptive reuse where possible while embracing market forces to make the option financially sustainable e.g., Golden Mile Complex
Sustainability requirements across supply chains for new builds	What can government do to achieve sustainability targets across supply chains?	Why is government leadership needed for this initiative or can this be achieved through private players?	How can we make this workable across the supply chain from large players to smaller ones (e.g., renewable energy)?
Group 4	Centralised stockpiles  Accredited suppliers	Incentives for adoption of recyclable building materials  Govt can facilitate private players via incentives or low cost accredited suppliers	
Group 5	Tax rebates or incentives for the various parts of the supply chain if they meet a certain sustainability target that can be benchmarked.	Private players will channel their funds into items that are first required by the government. E.g., If capex works are required for achieving Green Mark, the private players will have to direct their funds there in the first instance to fulfil the base requirements.	Making information accessible for all as a first step. Being informed of what is available in the market will allow for choices, and then opportunity to make more sustainable choices.

		It is also important for the government to show how they are being sustainable rather than just basing it on a lowest cost mentality. This will impact the private sector as well to make more informed choices.	
Group 6		Initiated by government and followed by private players. Private players will start if there is incentive.	
Group 7		Government and corporate leadership are needed to ensure that the various initiatives are integrated to achieve the strategic outcomes. Eco-systems are involved.	

**Future of Environment Discussants (in alpha order of organisation)**

<b>Name</b>	<b>Title</b>	<b>Organisation</b>
Justin Lui	Investment Analyst	32RE
Tony Ang	Advisor to the Board	Aedas
Tony Chan	Associate Principal, Cities and Planning	Arup
Terence Seah	Director, Head of Hong Kong, Singapore and Shenzhen	Benoy
Andi Tjong	Country Lead	BG&E
Nigel Ng	Manager, Investment and Asset Management	CapitaLand
Esther An	Chief Sustainability Officer	City Developments Limited
Shawn Chang	Senior Executive	Colliers
Desmond Sim	CEO	EDMUND TIE
Ong Choon Fah	Board Member	EDMUND TIE
Joel Boh	Corporate Development Manager	Far East Orchard
Kristie Wong	Senior Consultant, Head of Operations	Greengate Advisors
Pamela Jouwena	Associate, Design Strategy	Hassell
Kenneth Ho	Senior Design Principal	JERDE
Qiu Jianhan	Senior Consultant	JLL



Ng Hsueh Ling	Managing Director, Singapore and Chairman, Lendlease Global Commercial Trust Management	Lendlease
Eng Chin An	Student	National University of Singapore
Kenneth Kum	Investment Professional	Partners Group
Benjamin Robinson	CEO	Raffles Quay Asset Management
Michael Wan	Senior Investment Advisor	Strata AMC Pte Ltd
Sang Shin	Director, Enterprise Development Group	Temasek

**FUTURE OF LIVING**



Widened variety of accommodation options	What do we mean by a widened variety?	Why is this approach necessary for our social resilience and changing demographic?	How can we propagate this change? Is it gradual or a quick change?
Group 9	<p>More choices available at the different price points. Foreign professionals who contribute to our economy are deterred by the high housing prices. It is increasingly harder (economically) for millennials to buy properties. Millennials are open to rental and co-housing; Govt should make these options more widely available, to remove stigmatisation. Another key segment is senior housing where more options are required.</p>	<p>Benefits of wider housing options:</p> <ul style="list-style-type: none"> <li>- Lower priced options to attract <u>foreign talent</u> to SG.</li> <li>- Cater to the demand of <u>millennials</u> for independent living (instead of staying with parents). Increase networking and creativity.</li> <li>- Provide senior citizens with more housing options besides institutionalised care homes.</li> </ul>	<p>3P partnership (public, private, people). Govt can facilitate the change through land use planning regulations and incentives. Land use flexibility to allow the private sector more leeway to respond to and create market demand. The private sector must come up with good products and services to ensure a sustainable and viable business case. The public and the consumers must play their role to voice their interests and contribute to the process.</p>
Group 10	<ul style="list-style-type: none"> <li>• More options for singles, single parents, single elderly. Not only catering to families.</li> <li>• More choices of public housing in downtown or prime areas, more mixed-income neighbourhoods</li> <li>• More low and mid-rise communities. Not all high rise</li> <li>• More work-live options, like SoHo, shophouse, integration of living components in work districts</li> </ul>	<ul style="list-style-type: none"> <li>• Mixed-income neighbourhoods are necessary to avoid good schools only being in the more affluent neighbourhoods</li> <li>• Ageing society: more elderly singles. Many people are also choosing to remain single</li> </ul>	<ul style="list-style-type: none"> <li>• The change will be gradual to allow pilot projects and market response to shape the intensity and rate of change</li> </ul>
Group 11	<ul style="list-style-type: none"> <li>• Accommodation that is relevant to shifting demographic profile of Singapore society – ageing population, households that do not fall under the conventional family nucleus (singles, LGBT couples, single parents, widows)</li> </ul>	<ul style="list-style-type: none"> <li>• Accommodation that considers the shifting demographic profile of Singaporeans and their needs is socially inclusive and equitable</li> </ul>	<ul style="list-style-type: none"> <li>• Public housing policies that are socially inclusive in supportive home ownership for the marginal demographic groups which are excluded from benefits enjoyed by others</li> </ul>

	<ul style="list-style-type: none"> <li>Accommodation economic models (e.g., fractional home ownership, rent to own, co-living, shorter property land leases) that allows flexibility across ownership and rental to suit the different affordability profiles and life cycle stages of individuals – ensuring affordability for younger generation and retirees, options to allow asset-rich/cash-poor retirees to monetise their homes (HDBs and private housing)</li> <li>Accommodation that is relevant to global talent, including the global nomadic gig worker – flexibility for short stay, beyond just long stay</li> </ul>	<ul style="list-style-type: none"> <li>Different economic models of home ownership/ usage will allow Singaporeans to have more flexibility to improve their financial resilience which should improve Singapore's economic resilience as a country. Also, it will be in tune with how people are having much longer lifespans and will need more flexibility to enable self-reliance and resilience.</li> <li>Singapore is a global gateway city (state) and is facing growing competition for talent in a world where talent have unprecedented freedom to work from anywhere. Global talent makes a vibrant society, and this talent can be in different industries (arts &amp; culture, tech, R&amp;D, finance) and with different needs (tenure of stay, affordability). Competitive and flexible housing market can help Singapore to be competitive in the war for talent.</li> </ul>	<ul style="list-style-type: none"> <li>Be supportive of financial/ fintech innovation which can allow retirees to monetise their homes while continuing to stay in them</li> <li>There may be a gap between subsidised public housing and pricier private homes from the GLS model. Study public-private partnership models (PPPs) for housing delivery that are successful in other countries where the expertise of private sector developers can be harnessed and in collaboration with government to address social needs. Examples can include build-to-rent and master plan development approaches</li> <li>Recognise that both younger generations and the retirees across social strata may not all want to own their own homes, and for public policy (land supply, planning guidelines, tax) to be supportive of public and private rental housing and institutional capital funding</li> </ul>
Flexible spaces and community hubs	What do we mean by flexibility? Is it only physical spaces or includes planning regulations?	Why do we need this flexibility in the coming decades?	How do we achieve this? Is this a government led initiative or bottom up?
Group 8	Ease of reconfiguration/conversion, repurpose or hybrid to allow space to	There is increasing integration/blurring of space and activities in the digital sharing	Allowing for more open plan space in every development that could be easily



	<p>serve its purpose and function. Home-office, industrial-retail, serviced apartments-hotel, hotel-serviced office/co-working.</p> <p>It would have to be both. Physical spaces are regulated by planning regulations or licences.</p>	<p>economy and changing priorities leaning towards health and well-being. For example, hotels can also be co-working space; industrial as retail etc. Technology is fast changing how we consume space, and it will redefine real estate. Planning parameters will have to allow for quick changes in a sustainable and green way e.g., repurposing without demolition.</p>	<p>reconfigured/repurposed. This open component could be up to a quarter of approved use so that the major use intention is retained. Community hubs that can be self-sufficient allowing work-live-play anywhere.</p> <p>Public-private partnership is the most effective change accelerator. For example, government could allow private developers some flexibility for change of use without DC and in return developers could contribute to public projects/schemes serving the broader community.</p>
Group 9	<p>Flexibility in land use as mentioned above. In a rapidly changing environment, allow land and building to change the use to respond to the prevailing needs. E.g., during pandemic, pubs and lounges can pivot to restaurant use. Allow some flexibility in use of external areas - e.g., more alfresco dining without imposing heavy fees and fines. Flexibility in multi-use of spaces. E.g., daytime co-working office and night-time, cafe/restaurant.</p>	<p>Improves resilience. Optimises land use.</p>	<p>[Repeated] 3P partnership (public, private, people). Govt can facilitate the change through land use planning regulations and incentives. Land use flexibility to allow the private sector more leeway to respond to and create market demand. The private sector must come up with good products and services to ensure a sustainable and viable business case. The public and the consumers must play their role to voice their interests and contribute to the process.</p>
Group 10	<ul style="list-style-type: none"> <li>Flexibility in conversion of space to allow ageing in place</li> <li>Flexibility in planning regulations to allow use conversions and innovative combinations of uses.</li> </ul>	<p>Building industry resources are tightening, new buildings will become much more expensive to build in the future. Current model will create pressure to raise real estate prices</p>	<p>Government-led consultative review of policies and regulations that are creating obstacles to flexible use of buildings and land.</p>

	<ul style="list-style-type: none"> <li>Flexibility in building regulations to encourage rehabilitating buildings and neighbourhoods</li> <li>Current leasehold policy encourages buildings to be torn down before the end of their useful life.</li> </ul>		
Group 11	<ul style="list-style-type: none"> <li>Homes that are flexible in meeting the changing life cycle profile of Singaporeans, especially in response to Singapore's fast ageing population</li> <li>The extension of the idea of home beyond an individual's private personal space to that of the communal space</li> <li>Flexibility in home and communal spaces that help improve the resilience response of individuals, families, communities and hence Singapore</li> </ul>	<ul style="list-style-type: none"> <li>With ageing populations and the advent of technology, social loneliness is an area of growing concern. Housing has a great impact on the mental and physical well-being of their occupants while communities play an important role in fostering a sense of connectedness.</li> <li>As homes are getting smaller over the years while the number of single-person and elderly households will increase. The role of community hubs will be important in supporting the needs and physical and mental well beings of residents.</li> <li>As flexible work arrangements become increasingly the norm and with more work from home, housing and communal spaces will be increasingly multi-functional. This will be compounded by future episodes of pandemic which will require individuals to operate out of homes or within a small radius from where they live.</li> </ul>	<ul style="list-style-type: none"> <li>Public housing – age friendly product for ageing in place, flexible layouts, IoT friendly</li> <li>PPP – developers, health care services, education services</li> <li>Improve mobility and barrier free accessibility within neighbourhoods – dedicated cycling lanes, sheltered pathways that connect buildings</li> <li>Leverage existing infrastructure – MRT/interchange hubs (e.g., malls, HDB centres), community centres – but rejuvenate them to be fit for purpose for the needs of society and the future</li> </ul>

		<ul style="list-style-type: none"> <li>Having self-sufficiency in community hubs can help to reduce travel and hence is positive from both sustainability and quality of life perspectives.</li> </ul>	
Celebrating memories for a 'lovable city'	What do we consider as a lovable city?	Why is this so important at this juncture? Is it related to social resilience and community empowerment?	How can we enhance our environment to celebrate, propagate and sustain our 'memories' in the city?
Group 9	<p>Some of the characteristics include:</p> <ul style="list-style-type: none"> <li>- National Identity – Environment that fosters social memories in residents, diversity of experience, spatially and emotionally.</li> <li>- Sense of Pride – Distinctive architecture and built environment, clean, green, efficient, human-centric, inclusive, and compassionate society.</li> </ul>	Yes. In a highly globalised world, people's sense of attachment to place is very much diluted. A lovable city will strengthen the emotional connection. This is important for nation building.	3P approach.
Group 10	<ul style="list-style-type: none"> <li>A city that is a palimpsest of its past traces.</li> <li>A city that values preserving both the iconic urban scapes as well as the softer assets, e.g., hawker culture</li> <li>Where neighbourhoods evolve and grow without losing a sense of intimacy</li> </ul> <p>A city that allows its citizens to participate in its making and development, building a sense of ownership and community in the process.</p>	<ul style="list-style-type: none"> <li>As land resources become scarcer, the fears of being socially displaced in favour of new development become more apparent and frequent.</li> <li>Loss of familiar neighbourhood icons engenders feeling of disassociation, disorientation.</li> </ul>	<ul style="list-style-type: none"> <li>Smaller more intimate neighbourhoods, more walkable and cohesive clusters.</li> <li>Encourage rehabilitation of existing buildings instead of tearing them down. New lease of life in familiar settings.</li> <li>Optional programs for resettling in same neighbourhood</li> <li>Structured participatory planning process for town council-controlled public spaces.</li> </ul>
Group 11	<ul style="list-style-type: none"> <li>Strong sense of local identity and heritage through physical places</li> </ul>	<ul style="list-style-type: none"> <li>Trends that existed pre-pandemic are being accelerated, especially in</li> </ul>	<ul style="list-style-type: none"> <li>When redevelopments and new developments happen, there should</li> </ul>

	<ul style="list-style-type: none"> <li>• Thriving local communities that perpetuate and regenerate. These local communities form an important part of the city's identity and are conduits through which social memories and identity continue to perpetuate.</li> <li>• Inclusive spaces where diversity, sustainability and creativity are supported and celebrated, where members of the communities look out for one another and feel that they belong</li> </ul>	<p>relation to technology and income/social inequality. The sense of dislocation will only increase over time with changes in roles, stages in citizens' life cycle and continued globalisation. For societies to thrive amidst these changes, preserving a sense of identity and intentionality on inclusivity are important.</p> <ul style="list-style-type: none"> <li>• Studies have shown that physical environment plays a significant role in people's health and well-being, including mental well-being. Communities also play an important role in combating social loneliness.</li> </ul>	<p>be thoughtful consideration by both government and the private sector on the impact on the local communities. This can be through engagement and feedback and would be aligned with the "social" aspects of ESG considerations.</p> <ul style="list-style-type: none"> <li>• An example would be the promotion of old trades and conservation at the community level. This includes our hawker centre, coffee shop and public playground culture.</li> <li>• Iconic developments with heritage and historical significance should be better protected. This could include government incentives for conservation and to encourage a new economical lease of life into these developments.</li> <li>• One of the most defining demographic shifts in Singapore is that it is fast ageing. The built environment strategy and policy cannot be considered in isolation separate from the country's strategy for a silver population. Seniors will with each generation be living much healthier and active lifestyles compared to prior generations, and public policy needs to also consider the changing profile of seniors and avoid stereotyping</li> <li>• Intentionally building communities by facilitating the intermingling and co-existence of different generations e.g., co-locating senior care with child care</li> </ul>
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ADDITIONAL COMMENTS			
Walkable, Liveable neighbourhoods	What do we consider walkable neighbourhoods? <ul style="list-style-type: none"> <li>All essential needs within 10 mins walking distance</li> <li>All public realm integrated with walking and cycling “highways”</li> <li>Easy to get to public transport and live without owning a car</li> </ul>	Why is this so important at this juncture? Is it related to social resilience and community empowerment? <ul style="list-style-type: none"> <li>Social cohesion and sense of belonging are cultivated in shared public spaces. Areas that are universally and easily accessible on foot are more inclusive.</li> </ul>	How do we achieve this? <ul style="list-style-type: none"> <li>Smaller, self-sustaining neighbourhood clusters</li> <li>Hierarchy of cycle and walking pathways.</li> <li>Participatory planning to allow communities to map their own most frequented paths, then improve theses.</li> </ul>
<b>Future of Living Discussants (in alpha order of organisation)</b>			
Name	Title	Organisation	
Cheong Yew Kee	Founding Partner	2B Architects	
John Achari	Founder and Executive Director, Master Planning and Urban Design	Achari Concepts	
Chong Zhe Wei	Co-founder	Afternaut	
Ng Chiang Wei	Director	Allianz Real Estate	
Ng Li Ling	Head of Client Care, Asia	CBRE	
Jack Backen	Regional Director	Cistri	
Tang Wei Leng	Managing Director, Singapore	Colliers	
Chan Hui Min	Director and Board Member	DP Architects	
Zheng Wanshi	Group Chief Strategy & Planning Officer	Frasers Property Limited	
Lim EeTiong	Studio Director	Gensler	
Valerie Wong	Group General Manager	Guocoland Singapore	
Kristin Thorsteinsdottir	Head of Partnerships, Southeast Asia	IWG	
Jacky Cheng	Vice President, Director of Project Development, APAC	JERDE	
Mireille Wan	Head of Consulting Sales, Southeast Asia	JLL	
Anthony Chua	Deputy General Manager	Keppel Urban Solutions	
Helen Chen	Associate Professor	National University of Singapore	
Alessandro Fiascaris	Senior Vice President & Head of Investments, Asia Pacific	Oxford Properties Group	
Wee Su Lin	Executive Director and Head of Asset Management Southeast Asia	PGIM Real Estate	
Charles Griffith	Director, Business Development	Savills Investment Management	
Matthew Pryor	Managing Director and Co-Founder	Tenman Project Management	



ULI Singapore extends our appreciation to the following people and organisations who supported our workshop and our mission.

### **Volunteer Note Takers**

<b>Name</b>	<b>Title</b>	<b>Organisation</b>
June Ng	Manager, Investment Analytics	Firmus Capital Pte Ltd
See Boon Ping	Senior Planner	JTC
Kai Yip	Vice President, Investment Research	PGIM Real Estate
Jan Bronauer	Management Associate	Frasers Property Limited
Paul Yow	Manager, Strategy & Planning	Frasers Property Limited
Nicolas Ladouce	Senior Project Designer	JERDE
Shi Hanyan	Student	National University Singapore
Jason Lee	Assistant Vice President, Research	Frasers Property Limited
Dianne Goh	Marketing Communications Manager	Afternaut

### **Venue Host**



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